EIC3600 COMMERCIAL DATABASE SEARCH REQUEST

☐ RUSH - SPE signature required: _09/514,997_

Business Methods Case: 705/ _10_
Write in 705 subclass(es) to search required files for 705 cases or cases cross referenced in 705.

Requester's Full Name: _Susanna Diaz_   Examiner # : _76267_   Date: _1/6/04_

Art Unit: _3623_   Phone Number _305-1337_   Serial Number: _09/514,997_

Bldg & Room #: _Park 5 - 7704_   Results Format Preferred: PAPER ☑ DISK ☐ E-MAIL ☐

If more than one search is submitted, please prioritize searches in order of need.

Provide the PALM Bib page or the following:
Title of Invention: _Automatic Lead distribution and Processing Confirmation_

Inventors (provide full names): _Axel ▓ Schultze_

Earliest Priority Filing Date: _2/25/00_

Requested attachments:
- If possible, provide the cover sheet, the IDS, examples, or relevant citations, authors, etc, if known.
- Please attach copies of the parts of this case that help explain or are <u>most pertinent to this search.</u> Examples are:
  abstract, background, summary, claim(s) [not all of the claims].

The claimed or apparent novelty of the invention is:

I am looking for a database of sales leads that are sold to interested parties. A user interested in purchasing a sales lead(s) specifies desired criteria of the sales leads. The user is presented with a list of qualifying leads. The user then selects which leads, are of interested to him/her. The selected leads are transferred to

This search should focus on: a separate database that only the user can
(Also include keywords or synonyms)

access for a predetermined period of time. When this period of time expires, the selected leads are transferred back to the original database for other users to access. If you find this, please also look for a notification to a lead (i.e., the customer) that he/she has been selected by a user.

Thanks,
Susie

Special Instructions or Other Comments

US-PAT-NO: 5930764   *Melchione*

DOCUMENT-IDENTIFIER: US 5930764 A

TITLE: Sales and marketing support system using a customer
              information database

---------- KWIC ---------

Detailed Description Text - DETX (348):
   The account management component of the CCIS 13 is a system for account
officers to use to manage groups of households and/or customers by enrolling
them into special programs provided by the financial institution. Once the
household or customer is enrolled in a program and is assigned to a personal
banker, the personal banker can offer the customer personal relationship
management to better manage the customer's banking relationships. The **customer
will be "flagged" as a managed household to alert other sales staff that the
customer** has an exclusive relationship with a personal banker. It also
guarantees that **leads distributed** from the micromarketing center 11 are
assigned to the personal banker for that customer. The customer has the added
benefit of dealing with only one personal banker who understands the customer's
needs.